



STATE OF TENNESSEE  
Finance and Administration  
**AMENDMENT # 2**  
**RFP # 317.03-127**

November 16, 2005

The subject RFP is hereby amended as follows.

**A. The following RFP Schedule of Events updates or confirms scheduled RFP dates.**

EVENT	TIME	DATE	UPDATED/ CONFIRMED
1. State Issues RFP		October 25, 2005	CONFIRMED
2. Disability Accommodation Request Deadline		November 1, 2005	CONFIRMED
3. Pre-proposal Conference	1:00 p.m.	November 3, 2005	CONFIRMED
4. Notice of Intent to Propose Deadline		November 7, 2005	CONFIRMED
5. Written Comments Deadline		November 10, 2005	CONFIRMED
6. State Responds to Written Comments		November 18, 2005	CONFIRMED
7. Proposal Deadline	2:00 p.m.	November 30, 2005	CONFIRMED
8. State Completes Technical Proposal Evaluations		December 13, 2005	CONFIRMED
9. State Opens Cost Proposals & Calculates Scores	9:00 a.m.	December 14, 2005	CONFIRMED
10. State Issues Evaluation Notice & Opens RFP Files for Public Inspection	9:00 a.m.	December 16, 2005	CONFIRMED
11. Contract Signing		January 3, 2006	CONFIRMED
12. Contract Signature Deadline		January 10, 2006	CONFIRMED
13. Contract Start Date		January 16, 2006	CONFIRMED

**B. Delete RFP Attachment 6.3 Technical Proposal & Evaluation Guide, Section B-Qualifications & Experience in its entirety and insert the following in its place:**

TECHNICAL PROPOSAL & EVALUATION GUIDE — SECTION B			
PROPOSER NAME:			
EVALUATOR NAME:		DATE:	
EVALUATOR SIGNATURE:			
SECTION B — QUALIFICATIONS & EXPERIENCE			
The Proposer must address ALL Qualifications and Experience section items and provide, in sequence, the information and documentation as required (referenced with the associated item references).			
A Proposal Evaluation Team, made up of three or more State employees, will independently evaluate and score the			

proposal's "qualifications and experience" responses.

Proposal Page # (to be completed by Proposer)	Qualifications & Experience Items
	<b>B.1</b> Describe the Proposer's form of business ( <i>i.e.</i> , individual, sole proprietor, corporation, non-profit corporation, partnership, limited liability company) and detail the name, mailing address, and telephone number of the person the State should contact regarding the proposal.
	<b>B.2</b> Provide a statement of whether there have been any mergers, acquisitions, or sales of the Proposer company within the last ten years, and if so, an explanation providing relevant details.
	<b>B.3</b> Provide a statement of whether the Proposer or any of the Proposer's employees, agents, independent contractors, or subcontractors have been convicted of, pled guilty to, or pled <i>nolo contendere</i> to any felony, and if so, an explanation providing relevant details.
	<b>B.4</b> Provide a statement of whether there is any pending litigation against the Proposer; and if such litigation exists, an attached opinion of counsel as to whether the pending litigation will impair the Proposer's performance in a contract under this RFP.
	<b>B.5</b> Provide a statement of whether, in the last ten years, the Proposer has filed (or had filed against it) any bankruptcy or insolvency proceeding, whether voluntary or involuntary, or undergone the appointment of a receiver, trustee, or assignee for the benefit of creditors, and if so, an explanation providing relevant details.
	<b>B.6</b> Provide a statement of whether there are any pending Securities Exchange Commission investigations involving the Proposer, and if such are pending or in progress, an explanation providing relevant details and an attached opinion of counsel as to whether the pending investigation(s) will impair the Proposer's performance in a contract under this RFP.
	<b>B.7</b> Provide a brief, descriptive statement indicating the Proposer's credentials to deliver the services sought under this RFP.
	<b>B.8</b> Briefly describe how long the Proposer has been performing the services required by this RFP and include the number of years in business.
	<b>B.9</b> Describe the Proposer organization's number of employees, client base, and location of offices.
	<b>B.10</b> Provide a narrative description of the proposed project team, its members, and organizational structure.
	<b>B.11</b> Provide a personnel roster and resumes of key people who shall be assigned by the Proposer as Account Manager(s) [see Contract Section A.5] to manage the services under the contract (include estimated number of hours to be worked on the contract for each person, and the resumes shall detail each individual's title, education, current position with the Proposer, and employment history).
	<b>B.12</b> Provide a statement of whether the Proposer intends to use subcontractors, and if so, the names and mailing addresses of the committed subcontractors and a

Proposal Page # (to be completed by Proposer)	Qualifications & Experience Items
	description of the scope and portions of the work the subcontractors will perform.
	<p><b>B.13</b> Provide documentation of Proposer commitment to diversity as represented by its business strategy, business relationships, and workforce — this documentation should detail:</p> <ul style="list-style-type: none"> <li>▪ a description of the Proposer's existing programs and procedures designed to encourage and foster commerce with business enterprises owned by minorities, women, persons with a disability and small business enterprises</li> <li>▪ a listing of the Proposer's current contracts with business enterprises owned by minorities, women, persons with a disability and small business enterprises, including the following information <ul style="list-style-type: none"> <li>○ contract description and total value</li> <li>○ contractor name and ownership characteristics (<i>i.e.</i>, ethnicity, sex, disability)</li> <li>○ contractor contact and telephone number</li> </ul> </li> <li>▪ an estimate of the level of participation by business enterprises owned by minorities, women, persons with a disability and small business enterprises in a contract awarded to the Proposer pursuant to this RFP, including the following information: <ul style="list-style-type: none"> <li>○ participation estimate (expressed as a percent of the total contract value that will be dedicated to business with subcontractors and supply contractors having such ownership characteristics)</li> <li>○ descriptions of anticipated contracts</li> <li>○ names and ownership characteristics (<i>i.e.</i>, ethnicity, sex, disability) of anticipated subcontractors and supply contractors anticipated</li> </ul> </li> <li>▪ the percent of the Proposer's total current employees by ethnicity, sex, and disability</li> </ul> <p><b><i>Proposers that demonstrate a commitment to diversity will advance State efforts to expand opportunity to do business with the State as contractors and sub-contractors. Proposal evaluations will recognize the positive qualifications and experience of a Proposer that does business with enterprises owned by minorities, women, persons with a disability and small business enterprises and that offers a diverse workforce to meet service needs.</i></b></p>
	<p><b>B.14</b> Provide customer references for similar projects representing three of the larger accounts currently serviced. If the Proposer has fewer than three current accounts, provide customer references for previously completed projects to bring the total to three references provided.</p> <p>The references shall be provided to the State in the form of questionnaires that have been fully completed by the individual providing the reference. The State has included the reference check questionnaire to be used, as RFP Attachment 6.6.  <b>THE PROPOSER MUST USE THIS FORM, OR AN EXACT DUPLICATE THEREOF.</b></p> <p>The Proposer will be <u>solely</u> responsible for obtaining the fully completed reference check questionnaires, and for including them within the Proposer's sealed Technical Proposal. In order to obtain and submit the completed reference check questionnaire, the Proposer shall follow the process detailed below exactly:</p>

Proposal Page # (to be completed by Proposer)	Qualifications & Experience Items
	<ol style="list-style-type: none"> <li>1. Proposer makes an exact duplicate of the State's form, as it appears in RFP Attachment 6.6;</li> <li>2. Proposer sends the copy of the form to the reference it has chosen, along with a new, standard #10 envelope;</li> <li>3. Proposer directs the person providing the reference check feedback to complete the form in its entirety, sign and date it, and seal it within the provided envelope. The person may prepare a manual document or complete the exact duplicate Word document and print the completed copy for submission. After sealing the envelope, the person providing the reference <u>must sign his or her name in ink across the sealed portion of the envelope</u> and return it directly to the Proposer. The Proposer will give the reference check provider a deadline, such that the Proposer will be able to collect all references in time to include them within its sealed Technical Proposal.</li> <li>4. When the Proposer receives the sealed envelopes from the reference check providers, the Proposer <b><u>will not open</u></b> them. Instead, the Proposer will enclose all of the unopened reference check envelopes, in an easily identifiable larger envelope, and will include this envelope as a part of the written Technical Proposal. Therefore, when the State opens the Technical Proposal box, the State will find a clearly labeled envelope enclosed, which contains all of the sealed reference check envelopes.</li> <li>5. The State will base its reference check evaluation on the contents of these envelopes. <b><u>THE STATE WILL NOT ACCEPT LATE REFERENCES OR REFERENCES SUBMITTED THROUGH ANY OTHER CHANNEL OF SUBMISSION OR MEDIUM, WHETHER WRITTEN, ELECTRONIC, VERBAL, OR OTHERWISE.</u></b></li> </ol> <p>Each reference must include:</p> <ul style="list-style-type: none"> <li>• the Proposer's name;</li> <li>• the Reference's Organization name;</li> <li>• the Name of the person responding;</li> <li>• the Title of person responding; and</li> <li>• the Date the reference form was completed.</li> </ul> <p><b><i>Each evaluator will generally consider the results of reference inquiries by the State regarding <u>all</u> references provided.</i></b></p>
	<p><b>B.15</b> Provide a list, if any, of all current contracts with the State of Tennessee and all those completed within the previous five-year period.</p> <p>For each listed current or complete State contract, the Proposer must provide a completed Reference questionnaire in the same manner and format as described in B.14 above.</p> <p><b><i>Each evaluator will generally consider the results of reference inquiries by the State regarding <u>all</u> references provided. Current or prior contracts with the State are not a prerequisite and are not required for the maximum evaluation score possible, and the existence of such contracts with the State will not automatically result in the addition or deduction of evaluation points.</i></b></p>

<b>Proposal Page # (to be completed by Proposer)</b>	<b>Qualifications &amp; Experience Items</b>	
<i>(Maximum Section B Score = 35)</i>		
<b>SCORE (for <u>all</u> Section B items above, B.1 through B.15):</b>		